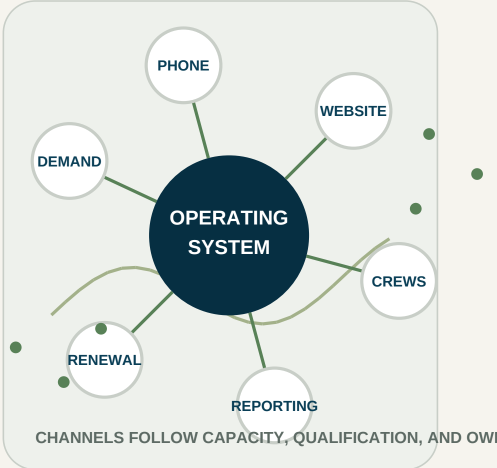
AI & AUTOMATION

Lead Routing and Qualification Across the Field Service Stack

A shared intake model for phone, forms, ads, CRM, estimators, branches, and field software.



THE CONSTRAINT

Lead routing breaks when each channel asks different questions and every system uses different stages. The office spends time rebuilding context while the prospect waits and branches argue over ownership.

USE THIS WHEN

Use this when leads arrive from multiple channels, services, or branches.

DO NOT START HERE

Do not automate routing before the company agrees on service, territory, capacity, and ownership rules.

Inputs to gather before the first meeting

1. Services, territories, and branch capacity
2. Qualification questions
3. CRM and field-software records
4. Response owners and escalation

The five-step playbook

Run the steps in order. A channel should never move faster than the operation that receives the work.

01 **Create one qualification standard**

Use service, property type, territory, timing, project or contract fit, and customer status. Channels may ask differently, but the final record should match.

02 **Assign ownership rules**

Define branch, estimator, office, account manager, and service roles. Include overflow, absence, and conflict rules.

03 **Normalise stages**

Use a common path from new to qualified, estimate booked, estimate sent, won, lost, and nurture. Keep service cases separate from sales.

04 **Move context with the lead**

Pass source, campaign, call notes, answers, property details, and previous activity into the assigned system. Do not force the next person to ask again.

05 **Close the feedback loop**

Send won, lost, unqualified, and capacity outcomes back to marketing. Routing improves when the system learns why work did or did not move.

Measure the operating result

These measures keep the playbook tied to booked work, delivery capacity, and client retention.

01	02	03	04
Routing accuracy	First-response time	Qualified-to-estimate rate	Unowned lead count

Thirty-day rollout

WEEK 1	WEEK 2	WEEK 3	WEEK 4
agree qualification and stages.	assign ownership and overflow.	connect fields and test routes.	launch feedback reporting.

Stop and scale rules

- One qualification standard across channels.
- Every record has one current owner.
- Sales outcomes return to the source report.

Launch checklist

- ☐ Questions standardised
- ☐ Ownership documented
- ☐ Stages aligned
- ☐ Context passed
- ☐ Overflow tested
- ☐ Outcome feedback active

One playbook fixes one constraint. We run the whole growth system.

Marketing, AI, website and reporting from $2,000/mo. Ad spend is excluded.

BOOK A GROWTH AUDIT